Payment Navigator
User Guide

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1 Getting Started

1.1 Introduction

Elavon's Payment Navigator is designed to effectively collect patient copayments, deductibles, and self-pay balances through the use of an Internet ASP solution. Payment Navigator is a Web-based, HFMA peer-reviewed solution tailored to the unique needs of hospitals and large physician practices.

Payment Navigator provides the ability to collect more patient self-pay balances at the point of care, verify insurance eligibility in real time, estimate patient out-of-pocket responsibility, and set up patient-friendly payment options, including automated payment plans and card on file. Payment Navigator also features a Patient Portal, which can be used alone for Web payments or in conjunction with eStatements, enabling patients to view and pay their statements online.

Payment Solutions

- **Patient Payments**: Accept all payment types (card, eCheck, cash) in person, by telephone, mail or online
- **Payment Plans**: Setup flexible payment plan options
- **Batch eCheck**: Deposit checks (single or batch) remotely
- **Estimator**: Calculate the estimated patient responsibility for services and capture a payment method at the time of registration
- **Patient Billing**: Streamline patient statement printing, fulfillment and mailing
- **Patient Portal**: Enable patients to view eStatements, pay bills online, set up flexible payment plans and more

Healthcare Solutions

- **Eligibility**: View eligibility benefits in real-time and submit requests in batch

This guide is designed to assist you in the successfully use the application.

1.1.1 Audience

This guide is for office personnel responsible for entering and maintaining patient and billing information. It includes information on all of the Payment Navigator system's optional features. **Your facility may not use all of the features described in the User Guide.** Please contact your Administrator if you have any questions about which available features apply.

This guide also provides Administrators with information to configure and manage the application. It is assumed that users are familiar with using a computer, common computer applications, and the Internet.

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1.1.2 System Requirements

Below are the recommended and minimum system requirements for the application:

Recommended

- Internet Connection: Cable, DSL or better
- Operating System: Windows 7, Server 2003 (with latest service pack), or better
- Internet Browser: Internet Explorer 8.0 or higher, Firefox, Chrome
- Computer Processor: 1.5 GHz (XP), 2-GHz (Vista) 32-bit (x86) or better
- Computer Memory: 1 GB or more
- Storage: At least 10 MB free space
- Screen Resolution: 1024x768 pixels or higher

Minimum

- Internet Connection: Dial-Up
- Operating System: Windows 2000, Vista, or Server 2003
- Internet Browser: Internet Explorer 7.0 SP2, 7.0
- Computer Processor: 800 MHz Pentium III or Athlon, or better
- Computer Memory: 512 MB or more
- Storage: At least 5 MB free space
- Screen Resolution: 1024x768 pixels

1.2 Logging In and Out

1.2.1 Logging In

Step 1. Double-click the Payment Navigator link on your desktop or launch your internet browser and type the URL **https://paymentnavigator.usbank.com** into the browser's internet address line.
Step 2. Enter your **User ID**, **Password,** and **Corporate ID**.
Step 3. Click **LOGIN**.

1.2.2 Changing your Password

Your password expires every 90 days. If you do not change your password before 90 days, you will be prompted to set a new password when you next log in.

To change your password, click:
CONFIGURE > **USERS & GROUPS > CHANGE PASSWORD**

Step 1. Enter your **Current Password**.
Step 2. Enter the **New Password**.
Step 3. Re-enter the new password in the **Confirm Password** field.
Step 4. Click **SAVE**.

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1.2.2.1 Password Requirements

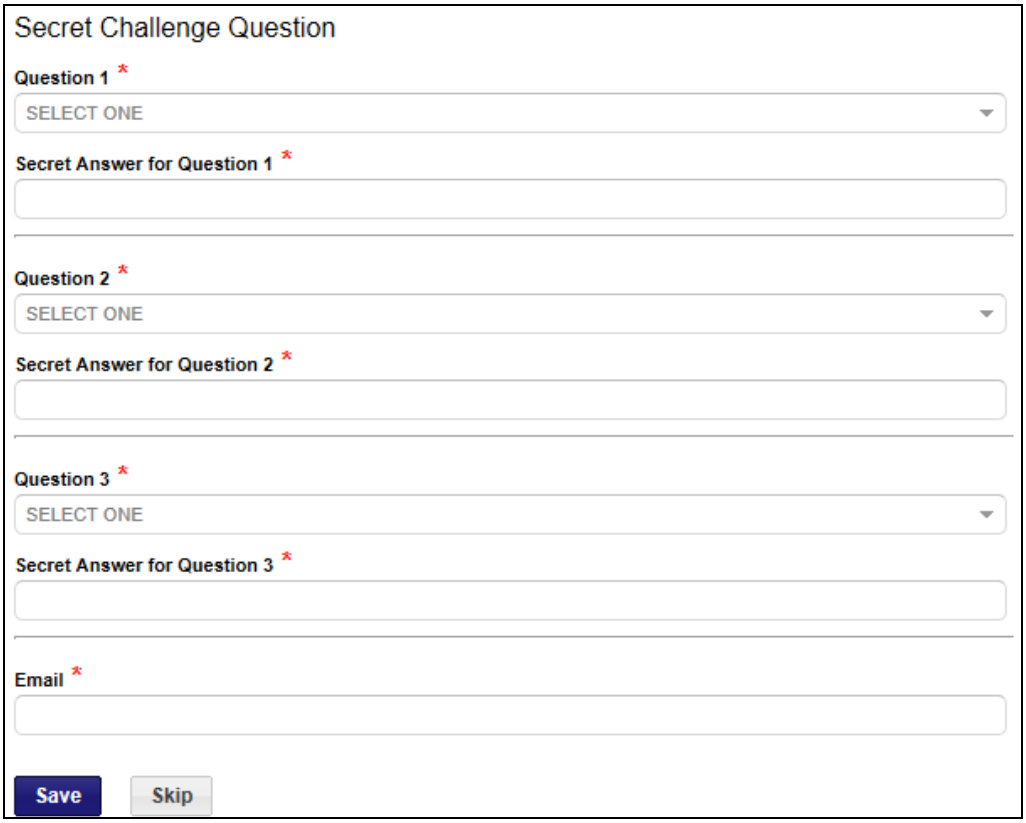
The following requirements apply when creating a password:

- 8-character minimum
- Must contain 3 character types (upper case, lower case, numeric, special character)
- Cannot be the previous 4 passwords
- Passwords are case sensitive

1.2.3 Setting your Secret Challenge Questions

To set your Secret Challenge Questions, click:
CONFIGURE > USERS & GROUPS > SECURITY QUESTION

Step 1. Select a **Question** from the drop-down.
Step 2. Enter the **Secret Answer**.
Step 3. **Repeat Steps 1 and 2** until you have 3 Secret Challenge Questions.
Step 4. Enter your **Email Address**. Email address is required.
Step 5. Click **SAVE**.
Note: The first time users log in they will be presented with the Secret Challenge Question form. Users may "skip" this screen up to 5 times. After the 5th time, they will not be able to move past this screen until the questions are completed.



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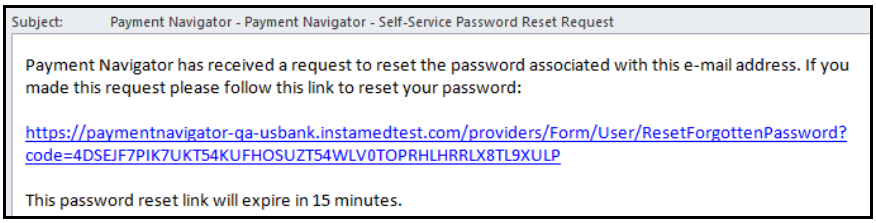
1.2.4 Resetting your Password

You may reset your own password if you entered a valid email address when completing your Secret Challenge Questions.

To reset your password:

Step 1. Enter your **User ID** and **Corporate ID**
Step 2. Click "**Forgot Password"**
Step 3. Payment Navigator sends an email to your email address on file with a link to reset your password

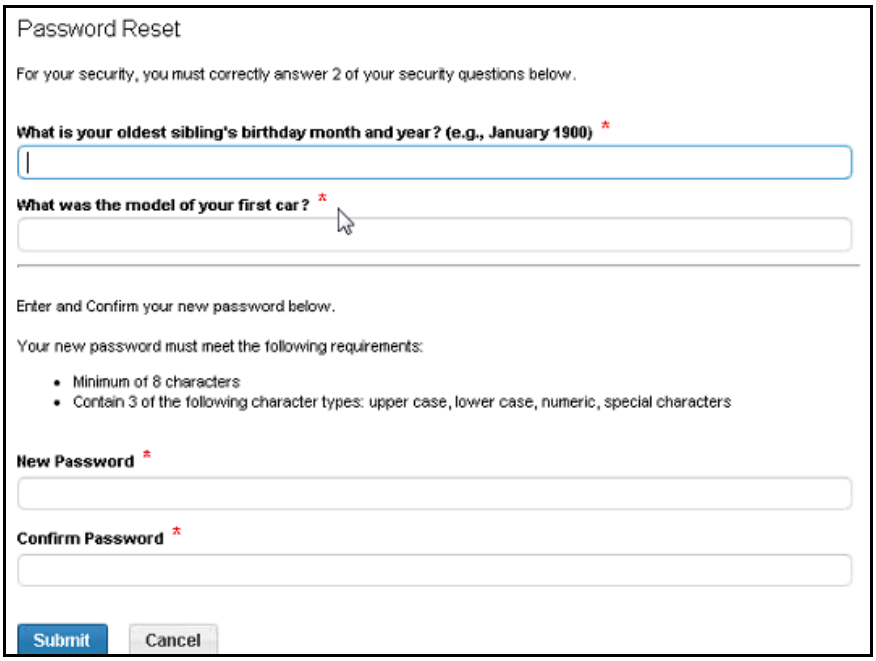

Subject: Payment Navigator - Payment Navigator - Self-Service Password Reset Request

Payment Navigator has received a request to reset the password associated with this e-mail address. If you made this request please follow this link to reset your password:

https://paymentnavigator-qa-usbank.instamedtest.com/providers/Form/User/ResetForgottenPassword?code=4DSEJF7PIK7UKT54KUFHOSUZT54WLV0TOPRHLHRRLX8TL9XULP

This password reset link will expire in 15 minutes.

Step 4. Click on the link in the email and you will be presented with a screen to answer 2 of your 3 security questions and to create a new password. You have 15 minutes to use the link in the email or it will expire. You only have 3 chances to answer the security questions correctly.



Step 5. You will receive another email notifying you the password reset is complete.

1.2.5 Unlocking your User ID

Your user profile may be locked due to the following:

- You failed to provide the correct login credentials on 6 consecutive attempts.
- 90 days have expired since your last login.

If your account is locked, a message will display under the **LOGIN** button after you attempt to log in. Please contact your System Administrator or Customer Service for assistance.

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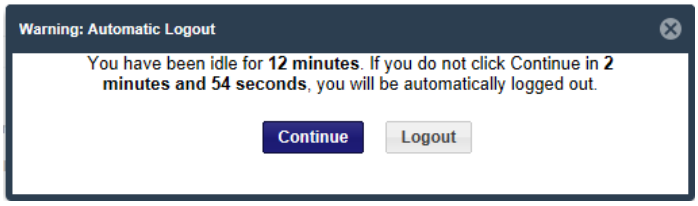
1.2.6 Logging Out

To log out, Click **LOGOUT** in the Main Menu.

1.2.6.1 Session Timeout

For security purposes, users are logged out of the application after 15 minutes of inactivity. After 12 minutes of inactivity, the **IDLE ACTIVITY MONITOR** pop-up displays. This pop-up displays a countdown of the final 3 minutes of the session.

- Click **CONTINUE** to extend your session.
- Click **LOGOUT** to end your session immediately.
- Do nothing. Your session will end and you will be returned to the login screen.



1.3 Using the Application

The application has a 3-level navigation scheme:

1. **Main Menu**: allows you to access the primary functional areas and to logout
2. **Tabs**: allow you to access the modules within a selected functional area
3. **Links**: allow you to access various screens within a module

User rights determine which modules you have access to. If you click a screen which you do not have rights to view, the following message will appear in the main window.

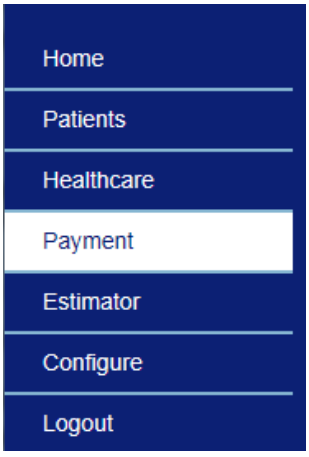
> ***Sorry! You don't have the necessary rights to enter this page.***
> ***Please try to login again or contact your administrator.***

Contact your System Administrator with questions about your user rights.

1.3.1 Main Menu

The Main Menu is located on the left side of the screen. Select a main menu item by clicking on it.

A description of each menu item is given below:



- **Home**: Displays a welcome page or allows users to select a frequently used screen to display
- **Patients**: Allows users to enter a new patient, locate an existing patient, activate or deactivate patients, and view coverage information.
- **Healthcare**: Allows users to verify eligibility.
- **Payment**: Allows users to enter, process and track card, eCheck and cash payments and to create payment plans.
- **Estimator**: Allows users to estimate patient responsibilities for procedures.
- **Configure**: Allows users to update their password. Users with additional access rights may access additional screens in this module.
- **Logout**: Logs user out of the application.

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1.3.2 Tabs & Links

Click a Main Menu item to display a set of tabs (otherwise known as Solutions). Under each Solution are a set of links, representing difference screens. Click on the Solution once to display the screens for that Solution. Click a link once to access the screen.

1.4 Basics

1.4.1 Basic Terms

The following are basic terms used throughout this guide:

- **Form**: Describes a screen where data may be entered.
- **Field**: Describes an element where specific data is entered or selected.
- **Tables**: Describes a structure of rows and columns for displaying data.
- **Pop-up Windows**: Describes a screen that pops-up in front of the main screen.

1.4.2 Data Entry

Fields that appear with an asterisk are required. If a required field is not populated or if data is in the incorrect format, a message will display at the top of the screen describing the error.

The characters shown below should not be used when entering data or in uploaded files.

*** : ; \ ( ) ^ % $! { } [ ] + ` ~ < > & “”**

1.4.2.1 Text Boxes

Text boxes allow users to enter free form text. To enter data, click inside the box and type.

1.4.2.2 Phone Numbers

Phone numbers must be in one of the following formats:

- (999) 999-9999
- (999) 9999999
- 9999999999

1.4.2.3 Dates and Times

Enter dates using the format MM/DD/YYYY or click the calendar icon to browse for a date. Use the arrow icons to adjust the hour, minute, and AM/PM.

Note: Use the [Tab] key on the keyboard to move through fields within the form.

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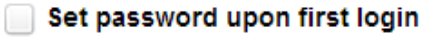
1.4.2.4 *Checkboxes*

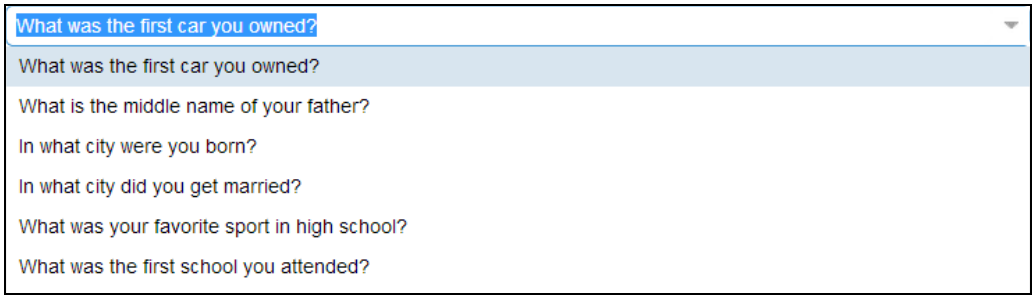
- **Data field** checkboxes represent options on a given form



- **Table** checkboxes are used to select transactions in a table. Select the checkbox in the column header row to select all items

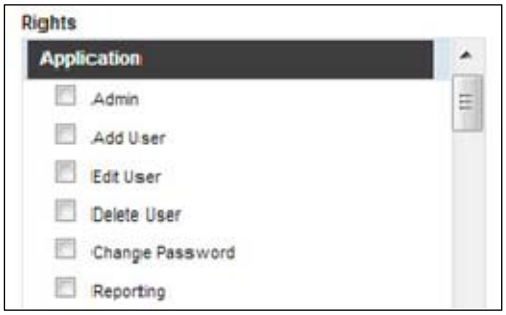
1.4.2.5 *Drop-Down Menus*

Drop-down menus allow users to select a single item from a list. Click the arrow on the right side of a drop-down menu to select an option.



1.4.2.6 *List Boxes*

A list box allows users to select multiple items from a list. Hold the **[CTRL]** key on the keyboard to select multiple items.



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1.4.3 Buttons

The following buttons are available in the application.

1.4.3.1 Table Buttons

The following buttons are available when viewing items in a table:

Button Label	Description
DOWNLOAD	Download all items to specified file format.
REQUEST EDI	Download selected item to EDI file.
SET STATUS	Apply specified status to selected items.
REMOVE	Delete selected items.
REMOVE ALL	Delete all items.
VIEW	Display next level of information in new table.
SAVE VIEW	Save changes made to tables when viewing data.
DETAIL	Display more information in a pop-up window.
RECEIPT	Display a payment receipt in a pop-up window.
HISTORY	Display transactions related to the item.
EDIT	Load item into form for editing.

1.4.3.2 Form Buttons

The following buttons are available when working in forms:

Button Label	Description
PREVIOUS	Go to previous form.
NEXT	Go to next form.
SKIP	Skip current form.
CLEAR	Clear all fields in current form.
CLEAR ALL	Clear all fields in all forms.
RESET	Restore the form to default state.
ADD	Open new form.
SAVE	Save current form.
SAVE & ADD	Save current form and add to new batch.
BROWSE	Locate a file in user's file system.
CHOOSE FILE	Locate a file in user's file system.
GO	Return summary results.
SEARCH	Return search results.
ACTIVATE	Switch saved form to active mode.
DE-ACTIVATE	Switch saved form to inactive mode.
MANUAL	Switch form to manual data entry mode.
SWIPE	Switch form to device data entry mode.

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1.4.3.3 *Detail Window Buttons*

The following buttons are available when viewing a detail pop-up window.

Button Label	Description
SAVE	Save current screen to file.
PRINT	Print current screen.
CLOSE	Close pop-up window.

1.4.3.4 *Action Buttons*

The following buttons launch or trigger transactions and may be available when viewing a table, form, or detail window.

Button Label	Description
PROCESS	Process healthcare transaction(s).
SUBMIT	Process payment transaction.
UPLOAD	Upload specified file for processing.
VERIFY ELIGIBILITY	Launch eligibility inquiry from current item.
RESUBMIT	Load current or selected item into form or new batch.
COLLECT NOW	Launch payment transaction from current item.
VOID	Launch void payment transaction from current item.
REFUND	Launch refund payment transaction from current item.

1.5 Working with Tables

1.5.1 Paging

To navigate between pages, click the arrow buttons (first page, previous page, next page, last page).

1.5.2 Save View

To save changes made to tables when viewing data (e.g., hiding / un-hiding columns, dragging and dropping columns, etc.), click **SAVE VIEW** otherwise the changes will not save the view.

1.5.3 Downloading

Table results may be downloaded. Select a **Format** from the drop-down menu and click **DOWNLOAD**. You will be prompted to save the file or open the file in another program.

The following formats are available for download:

- **Easy Print (.txt)**
- **Excel (.xls)**
- **Comma Delimited (.csv)**
- **Tab Delimited (.txtT)**
- **Pipe Delimited (.txt)**
- **Space Delimited (.txt)**

Note: The Easy Print format is intended to print to 8.5 x 11” paper with standard margins without overlapping. As such, the format displays a limited subset of the available information and may truncate some values. Easy Print format cannot be modified, whereas all other formats may be modified by changing the table configuration as described in the Configuration section.

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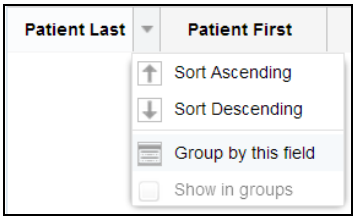
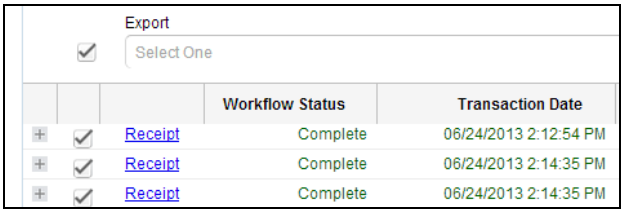
1.5.4 Sorting

Click the drop-down button in the column header to sort ascending or descending.



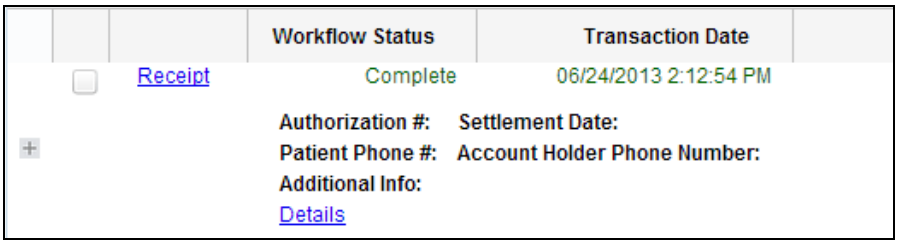
1.5.5 Selecting Rows

To select all items in a table, click inside of the box located in the leftmost column of the header row. To select specific items, click inside the checkbox in the leftmost column of the row.



1.5.6 Viewing Details

When viewing in table format, click the ⊞ icon to display more details.

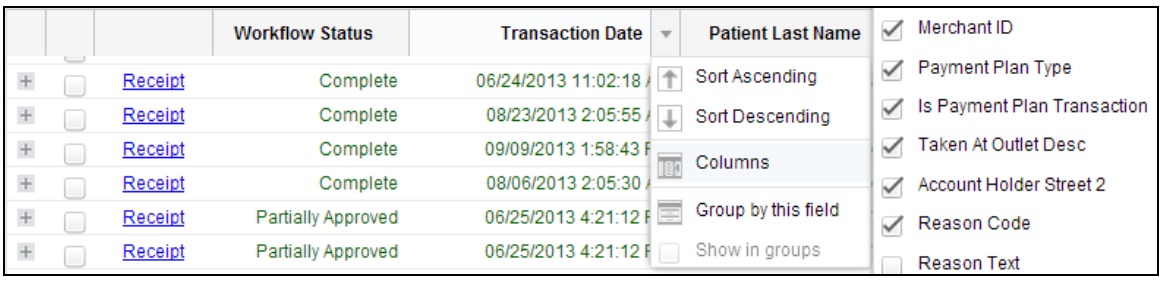


1.5.7 Configuring Number of Items per Page

To configure the number of items in a table that appear per page, refer to the Configuration section.

1.5.8 Hide / Unhide Columns

Click the drop-down menu in the column header and select **Columns**. Check / un-check columns to hide or un-hide columns.



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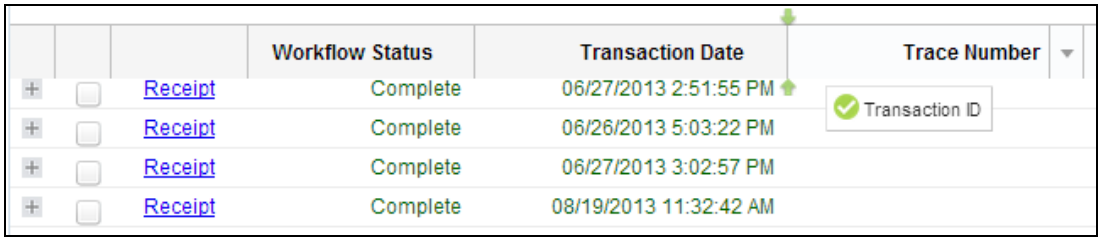
1.5.9 Re-ordering Columns

Drag and drop columns in the table to re-order columns in the table.



1.6 Workflow Status

Workflow statuses allow users to assign easy-to-understand categories to transactions. Workflow status can be assigned automatically when certain events occur, for example, if a transaction receives a response or if a user modifies a transaction.

Every transaction type has a unique set of workflow statuses that are available by default. Also, each workflow status has an associated color scheme. For example, an eligibility request that returned Active Coverage may have green highlighting.

1.6.1 Setting Workflow Status

Workflow status may be updated manually by the user. For example, it may be appropriate for a user to assign a specific workflow status after a reviewing a transaction. To update workflow status when viewing transactions:

Step 1. Select one or more transactions using the checkboxes in the table.
Step 2. Selected the desired **Workflow Status** from the drop down menu above the table.
Step 3. Click **UPDATE**.

1.7 Getting Help

1.7.1 Online Support

The application contains the following links in the top right-hand corner of the screen:

- **Customer Service**: Pops up a window with all customer service options.
- **Help**: Pops up contact information for customer service.
- **User Guide**: Pops up a window with links to reference and training documents.

1.7.2 Contacting Customer Service

A Technical Support Representative is available to assist you 24 hours a day, seven days a week at (866) 869-8500.

If you are experiencing issues with Payment Navigator, gather the following information if possible before contacting Customer Service. These steps will provide specific information that will be helpful to quickly diagnose your issue.

1.) Are you able to recreate the issue on another machine?

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2.) Run a speed test from the machine to get a better understanding of the bandwidth of the connection:
   - Make sure the computer is connected to the Internet
   - Go to: http://www.speakeasy.net/speedtest/
   - Select the city closest to you
   - Wait for test to run and record the results below:
     Download Speed: _____ Upload Speed:_____

3.) Determine which applications are running on the machine when experiencing the issue:
   - Hit CTRL+ALT+DEL
   - Select Task Manager
   - Click on the Application tab
   - Make a list of the programs which are listed

4.) Document any circumstances that cause the problem to occur. Examples include:
   - When certain applications are running on your computer
   - When you perform certain tasks in Payment Navigator or another application
   - When one of the applications pops up a new browser window
   - When you initiate a print window from an application

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